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SP Release 1.7

March 2005

V1.7 Features at a glance


- ❖ The “Invited” Registration Option
- ❖ Strong passwords
- ❖ Auto Fill Options
- ❖ “Clone” Forms
- ❖ My Forms and Labels
- ❖ Search Forms
- ❖ Extract Data

V1.7 – Registration


In addition to the SP self-registration method, SP now supports an “invitation” method, also called “delegator-style” registration.

- ❖ A registered SP user (inviter) routes a form to a non-registered user (invitee).
- ❖ SP will automatically email an invitation to invitee, including a link to registration site
- ❖ Invitee clicks on link, and presents smartcard
- ❖ If certain criteria are met, then the invitee is automatically registered.
- ❖ If some criteria are NOT met, then the inviter must confirm the registration details of the invitee, before the invitee can use SP.
- ❖ Inviters can revoke invitations.
- ❖ Invitations can expire.

Invitation to Register




Welcome to Probaris® SP



If you have been invited to register. To do so, insert your SmartCard and press "Next".

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Invitee Registration



Confirm Registration

Registration requires confirmation by invitee....



Registration Complete

Congratulations, you have completed registration.
Before you may use SP, however, your registration must be confirmed by the inviter, who will need your confirmation number.
Your confirmation number is: TG45662A

Close

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Inviter View of Registrations


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Verify Pending Invitations

Showing 0 - 0 of 0

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E-mail Address ▲	Name (last, first)	Invitation	Status	Action		Details
guest@somedomain.com	Guest McFly	08/13/2004	Awaiting Confirmation	verify	revoke	
foo@bar.com	Foo Bar	08/10/2004	Awaiting Confirmation	verify	revoke	
rlevas@probaris.com	Robert Levas	06/23/2004	Awaiting Registration	verify	revoke	

Back

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V1.7 – Strong Passwords

SP now supports a wide variety of stronger password protocols, including:

- ❖ Password aging – a user must select a new password every X months.
- ❖ Password criteria – a users' passwords must contain a mixture of upper case and lower case letters, numbers, or special characters.
- ❖ Passwords must be 'new'- a users' new password must not be identical to prior passwords

Strong Password



Register Password

Attention! The password must not equal all or portions of the users login id.

Password:

Password (again):

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Strong Password (Cont.)




Register Password

Attention! The password must be at least 8 characters long.
The password must contain both upper and lower case letters.
The password must contain at least one number.
The password must contain at least one of the following: ~!@#\$%^&*()_+={}[]\|;:'<,>./.
The password must be unique across the last 10 passwords used.
The password must not equal all or portions of the users login id.

Password:

Password (again):

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V1.7 – Auto Fill Options

SP supports a number of options to help users quickly fill in forms.

- ❖ Users can prefill a form with data from the users' profile. Standard fields can be set up for the users' name, office, phone number, etc.
- ❖ Users can prefill a form with data from a previously routed form. When editing a form, SP can automatically copy the data from a previously routed form.

Auto-Fill Options

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Form masked1 [masked2] (maskedform) Serial Number Editing Section 1 of 8

Form 9130-003
(September 2004)

UNITED STATES
DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT

NATIONAL SIGN CENTER REQUISITION

Bold* fields are required.

Section 1 - Completed by Originator			
1. Location*			
State	<input type="text"/>	Field Office	<input type="text"/>
2. Originating Office Contact*			
Name*	<input type="text"/>	Org Code*	Phone Number*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Auto-Fill Options (Cont.)

Auto-Fill

To copy data from a previously filled in form, press "Copy".

To fill in only personal data from your user profile, press "Profile-only".

Copy

Profile-only


Cancel

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Fill from Profile Option

Prefill from profile data

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Form masked1 [masked2] (maskedform) Serial NumberEditing Section 1 of 8



Form 9130-003
(September 2004)

UNITED STATES
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NATIONAL SIGN CENTER REQUISITION

Bold* fields are required.


Section 1 - Completed by Originator			
1. Location*			
State	<input type="text"/>	Field Office	<input type="text"/>
2. Originating Office Contact*			
Name*	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Hong	Gao	
Org Code*	<input type="text"/>	Phone Number	<input type="text"/>
	AA9999	212-223-9921	

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Fill from Previous Form Option

Prefill from previously routed



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Form masked1 [masked2] (maskedform) Serial Number

Editing Section 1 of 8



Form 9130-003
(September 2004)

UNITED STATES
DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT

NATIONAL SIGN CENTER REQUISITION

Bold* fields are required.

Section 1 - Completed by Originator			
1. Location*			
State	Alaska	Field Office	Anchorage
2. Originating Office Contact*			
Name*		Org Code*	Phone Number*
Hong		AA9999	212-223-9921

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V1.7 – Clone form

Another way to help users fill in forms quickly, SP supports 'cloning' a form instance.

- ❖ When viewing any form, the user may create a new version of the same form, including the data from the first section.

Clone

61. Date* (MM/DD/YYYY)

62. Signature

You have the ability to sign this form only if a SmartCard or digital certificate has been issued to you.

INSTRUCTIONS

Form 9130-3 is to be used to order signs from the National Sign Center only. Consult BLM Manual Section 9130 for other procurement sources and specific guidance.



Form Actions:

Route

- Route
- Send for edit
- Send for review
- Transfer
- Send blank
- Copy
- Clone

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V1.7 – My Forms and Labels

In order to help users track and manage the forms they use, SP supports labels.

- ❖ Labels are simply tags that a user creates, and applies to forms. The user can then view all forms with a specific tag.
- ❖ One form can be tagged with multiple labels.
- ❖ One label can be applied to multiple forms.

My Forms

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Action Items

My Forms

Archived Forms

Recent Forms

Labels
[All](#)
[Uncategorized](#)
[DE Project](#)
[NJ Project](#)
[PA Project](#)
[Pending Survey](#)
[Personal](#)
[Project Requests](#)

Manage Labels

DE Project

Select [All](#) [None](#)

Page: 1 of 1
Showing 1 - 1 of 1 [Selected 0]

	Form	Step	Status	Current Editor	Serial#
<input type="checkbox"/>	  4section1 [4sec...	1 of 4		Sam Garst	00022-00001

Archive Form

Remove Label

DE Project

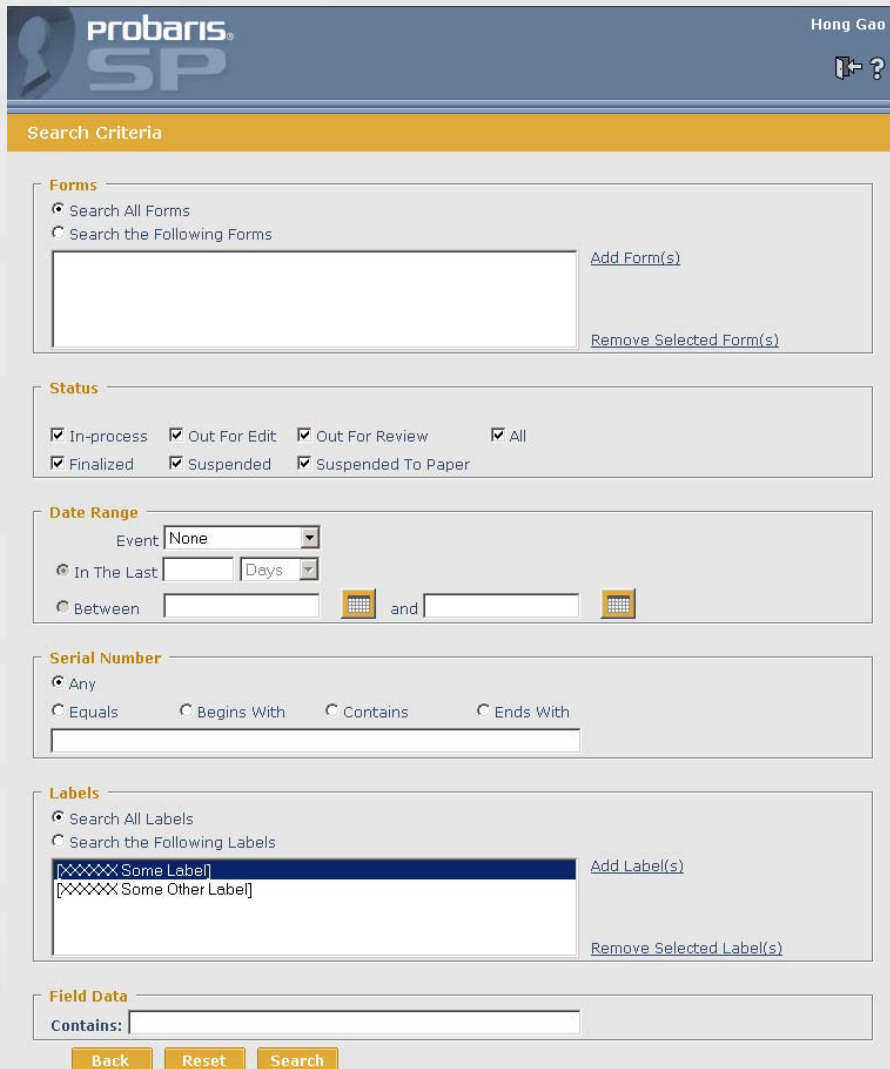
Apply Label

V1.7 – Search Forms

In order to help users find forms, SP now supports search. A user can search through all their forms (forms they've edited, reviewed, or been copied). Users can search on a variety of criteria, including:

- ❖ Keywords – search all form instances that contain the word “violation”, or “PA-19923”
- ❖ Dates – search for forms that have been originated within the last week, or have been editing between two dates.
- ❖ Status - Search all forms that have been finalized.

Search



The screenshot shows the 'Search Criteria' form in the Probaris SP application. The form is organized into several sections: 'Forms', 'Status', 'Date Range', 'Serial Number', 'Labels', and 'Field Data'. The 'Forms' section has radio buttons for 'Search All Forms' and 'Search the Following Forms', with a text input field and links for 'Add Form(s)' and 'Remove Selected Form(s)'. The 'Status' section has checkboxes for 'In-process', 'Out For Edit', 'Out For Review', 'All', 'Finalized', 'Suspended', and 'Suspended To Paper'. The 'Date Range' section has a dropdown for 'Event' (set to 'None'), radio buttons for 'In The Last' and 'Between', and input fields for time periods. The 'Serial Number' section has radio buttons for 'Any', 'Equals', 'Begins With', 'Contains', and 'Ends With', with a corresponding text input field. The 'Labels' section has radio buttons for 'Search All Labels' and 'Search the Following Labels', a list of labels with checkboxes, and links for 'Add Label(s)' and 'Remove Selected Label(s)'. The 'Field Data' section has a 'Contains:' label and a text input field. At the bottom are 'Back', 'Reset', and 'Search' buttons.

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Search Criteria

Forms

☐ Search All Forms
☐ Search the Following Forms

[Add Form\(s\)](#)

[Remove Selected Form\(s\)](#)

Status

☒ In-process ☒ Out For Edit ☒ Out For Review ☒ All
☒ Finalized ☒ Suspended ☒ Suspended To Paper

Date Range

Event:

☒ In The Last Days

☐ Between and

Serial Number

☒ Any
☐ Equals ☐ Begins With ☐ Contains ☐ Ends With

Labels

☒ Search All Labels
☐ Search the Following Labels

☒ [XXXXXX Some Label]
☐ [XXXXXX Some Other Label]

[Add Label\(s\)](#)

[Remove Selected Label\(s\)](#)

Field Data

Contains:

[Back](#) [Reset](#) [Search](#)

Search Criteria

- ❖ Form number (form template)
- ❖ Status (finalized, in process, etc).
- ❖ Date originated, last edited or finalized
 - Within the last X days, weeks, or months
 - Between two dates
- ❖ Form serial number
- ❖ Label
- ❖ Keyword search

V1.7 – Extract Data

Data Central allows users to quickly extract data from sets of forms for use in other applications.

- ❖ Users can select a set of forms, and download a comma separated value file containing the data from all the forms.
- ❖ This file can be used in Excel, or imported in to various database packages.